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ADDITIONAL TERMS:

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| **SCOPED SERVICE(S)** |
| Workiva will perform the following scoped Service(s) for Customer in accordance with their associated descriptions. |
|  **Consulting:** https://www.workiva.com/consulting\_2303 |  |

**Summary Scope of project\***

1. Data Collection process
	1. Aggregated data level / input by data owners
	2. No source system connections to Workiva platform
	3. Status tracking of data collection process
2. Framework mapping to support the following frameworks/questionnaires/surveys
	1. SASB
	2. GRI
	3. TCFD
	4. UN SDG
	5. CDP
3. The following frameworks will be set up by the Customer with enablement guidance by Workiva. Workiva will provide the data model to support the final mapping creation of the indicators to the collected data and other frameworks. The client is responsible for providing the framework content (i.e. indicators), selecting material indicators in the frameworks and creating the final mapping of the indicators to the collected data and other frameworks with the Workiva provided data model. Client is responsible for maintaining the content after the implementation project.
	1. DJSI
	2. EcoVadis
	3. Additional Framework(s)
	4. Additional Questionnaire(s)
4. Reports (Documents/Presentations) in scope
	1. NAME OF CUSTMER Report– Document
5. Additional report outputs: Framework indices / questionnaires / rating surveys in scope
	1. SASB content index - Document
	2. TCFD content index - Document
	3. CDP- Spreadsheet Template
	4. Workiva will include training to enable the Customer to implement subsequent frameworks / questionnaires / rating surveys, as applicable
6. Workiva platform enablement and training
	1. Basic Workiva platform training (online learning hub)
	2. Document management and editing training
	3. Annual roll-forward documentation training
	4. Data model documentation and training
7. Project management

\*Further details on the activities and deliverables in scope for this implementation project that are summarized above are broken down below in the ‘Deliverables and activities’’ sections.

**Collaboration**

Workiva will work collaboratively with Customer’s internal stakeholders for the project discovery, requirements gathering, planning and implementation of the solution. Customer will provide the required information and guidance to the Workiva project team as required for the implementation of the solution.

Workiva and Customer will work together to implement the solution based on Customer’s files, input, comments, feedback and guidance

Workiva will not provide legal recommendations or opinions in this project.

**Customer responsibilities**

1. Provide a single point of contact for identification of key stakeholders, scheduling meetings, and collection/providing of required information to Workiva
2. Identification and involvement of the key stakeholders throughout the project life cycle and timeline
3. Review, provide feedback, and sign off the project plan draft provided by Workiva
4. Participate in regular meetings (e.g. status / discovery calls) scheduled by Workiva
5. Provide any additional files that are required for the implementation
6. Provide summary of ESG frameworks and listing of relevant data points to collect
7. Provide guidance on mapping of data collection sheets and framework items
8. Resolve the risks and issues that are related to the project escalated by Workiva
9. Grant Workiva the access to the environment to complete implementation of the solution
10. Test and validate the solution after the implementation is completed
11. Organize the participants for the training sessions

**Deliverables and activities**

1. Set up of Data Collection process
	1. Discovery session(s) to gather current materials. map process and discuss/validate future design
	2. Data Collection is on a business unit level and Data Collection sheets will be set up to accommodate consolidated data provided by data owners
	3. Data Collection sheets will be based on Customer provided collection sheets or input
	4. Workiva will apply best practice adjustments to these sheets
	5. Data Collection processes will be embedded in a data model that allows for collected data to be associated with relevant Framework items
2. Data Collection status tracking
	1. Discovery session(s) to gather current materials, requirements and discuss/validate future design
3. Set up of Framework Mapping
	1. Discovery session(s) to gather current materials, requirements and discuss/validate future design
	2. Framework mapping will be based on Customer provided mapping files or guidance
	3. Workiva will apply best practice adjustments to the structure of this mapping
	4. Frameworks will be linked to the report outputs indices
	5. Workiva will enable the Customer team to establish ad hoc linkages from Frameworks to output reports
	6. Workiva will set up a Central Fact Book to accommodate detailed data breakdowns for key performance data - exact data points to be discussed in discovery sessions
4. Reports - Workiva resource(s) will setup and enable the following reports with Customer input and or Customer provided native xlsx or .docx file(s)
	1. CUSTOMER ESG Report - Document
	2. SASB, TCFD, and GRI content indices - Document(s)
	3. Notes to all above reports in scope:
		1. Setup to include general report outline, structure and index tables, to be tailored to design considerations (i.e. brand guidelines and style guide)
		2. Document setup services do not cover full designed report setup and will exclude any designed elements or graphics
	4. CDP Spreadsheet Template: Workiva resource(s) will import CDP Spreadsheet template(s), create sample linking from Central Fact Book and enable the Customer to complete remaining linking, as applicable
5. Dashboards - Workiva resource(s) will setup and enable up to two (2) dashboard presentation views
	1. Discovery session(s) to gather current materials, requirements and discuss/validate future design
	2. Workiva will enable the Customer to create subsequent dashboards, as needed
6. Platform training and enablement
	1. Best practice sharing
	2. Data model / roll-forward documentation
	3. Training and enablement
	4. 3rd party copywriter onboarding, if applicable
	5. 3rd party design agency onboarding, if applicable
7. Project management
	1. Workiva resourcing
	2. Project plan / status updates / weekly client calls
8. Services exclude
	1. Source system(s) integration/direct connectivity with Workiva platform
9. Note: Data Collection sheet(s), Framework(s), Central Fact Book and Output Reports shall be deemed accepted by the Customer within five (5) business days after delivery. Customer shall be responsible for maintaining the Central Fact Book, Data Collection sheet(s) and Framework data points going forward.